

If We Had a Prologue — Presented by Laura Krier (Sonoma State University); Jodi Shepherd (California State University, Chico) [2017 Charleston Conference Session Report]

By: [Christine Fischer](#)

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Abstract:

The twenty-three campuses of the California State University system migrated to Ex Libris Alma with a go-live date in June 2017. The presenters shared their experiences as project managers for their libraries. Krier and Shepherd described the structure of the working groups and implementation teams, the meeting schedules, and the value of having central staff to consult before directly contacting Ex Libris. They emphasized the importance of communication in helping staff understand the reason for the migration. Neither library was fully staffed during the process, which added to the challenge of staff completing regular work, while contributing to the implementation and participating in extensive training. The majority of workflows changed, and staff contributed to discussions on what they wanted to accomplish rather than simply describing how specific tasks were performed. Much of the presentation was devoted to suggestions to meet challenges they experienced, such as having a good understanding of what data cleanup is needed prior to the migration, choosing one place to post information, establishing naming conventions for files, and documenting decisions made throughout the process. Attendees contributed to an energetic question and answer period.

Keywords: system migration | Ex Libris | conference report

Article:

***Note: Full text of article below

If We Had a Prologue — Presented by **Laura Krier**
(Sonoma State University); **Jodi Shepherd** (California
State University, Chico)

*NOTE: The presenters expanded the session title
listed in the program to: ***If We Had a Prologue:
Lessons from a System Migration.****

Reported by **Christine Fischer** (University of North Carolina at
Greensboro, University Libraries) <cmfische@uncg.edu>

The twenty-three campuses of the **California State University** system migrated to **Ex Libris Alma** with a go-live date in June 2017. The presenters shared their experiences as project managers for their libraries. **Krier** and **Shepherd** described the structure of the working groups and implementation teams, the meeting schedules, and the value of having central staff to consult before directly contacting **Ex Libris**. They emphasized the importance of communication in helping staff understand the reason for the migration. Neither library was fully staffed during the process, which added to the challenge of staff completing regular work, while contributing to the implementation and participating in extensive training. The majority of workflows changed, and staff contributed to discussions on what they wanted to accomplish rather than simply describing how specific tasks were performed. Much of the presentation was devoted to suggestions to meet challenges they experienced, such as having a good understanding of what data cleanup is needed prior to the migration, choosing one place to post information, establishing naming conventions for files, and documenting decisions made throughout the process. Attendees contributed to an energetic question and answer period. 